



Job Title:	Customer Account Manager
Reports To:	Sales Manager
Based At:	Swinton/Glasgow/ Carlisle

#### **JOB OVERVIEW**

As Customer Account Manager you will be responsible for ensuring that the highest level of customer service, compliance and productivity is delivered, whilst achieving your weekly and monthly sales targets.

You are responsible for the first stage of assessing a client's viability for a formal solution via telephone, collecting the relevant documents from the client and logging these in a timely manner and accurately in the system. Which will allow the provision of accurate advice and the best solution for them. The client is then responsible for making the decision regarding the option they feel is best for them.

#### **KEY RESPONSIBILITIES**

- Receiving warm leads from clients in financial difficulties
- Dealing with assets and valuations
- Complete Insolvency Practice checklists
- Complete initial telephone call to assess case viability
- Adherence to call scripts
- Client documentation collected for verification
- Matching verbal figures from client to documentation provided by client
- Documents are logged and scanned onto the system
- Case is assessed against CRM Criteria
- Dealing with Vulnerable Clients
- Advising on financial solutions
- Effective questioning to Clients
- Focus on best practice (Industry regulations)
- Generating sales in accordance with the performance targets set individually and by department by the Company, whilst maintaining the required compliance
- Ensure client's best interests are met at all times and integrity, compliance, and case quality is met and adhered to
- Ensuring all existing and potential client data obtained by way of day to day activities is recorded in the relevant Company systems and GDPR legislation is adhered to
- Ensuring all Company processes and policies are adhered to
- Any other duties as required

## SKILLS AND KNOWLEDGE/PERSONAL ATTRIBUTES

- Be an experienced sales person, with track record of success in achievement of targets and KPI's within a highly targeted environment
- Have experience within a fast-moving and customer focussed environment
- Have a caring nature as the role involves dealing with vulnerable clients
- Be a natural people person, with energy and passion for what you do, who loves achieving target and achieving success
- Proactive, flexible and have the ability to adapt to the changing business needs
- Be able to work to deadlines; prioritise work to meet the our commercial needs
- Have excellent attention to detail
- Ensuring you keep up to date trends within the industry
- Maintaining daily communication within departments
- Can do attitude
- Strong communication, interpersonal and influencing skills
- Have excellent stakeholder management skills
- Have excellent IT skills and experience of sales software
- Be self-motivated and organised and a natural 'roll your sleeves up and get on with it' person
- Have flexibility regarding hours of work

**Date Prepared/Reviewed:** Claire Clark

**By:** August 2018